



Packaged Software Request for Information

This deliverable contains general questions (based on screening criteria) to send to vendors so that background information may be obtained about their company and its packaged software products. Use this deliverable when conducting an initial investigation of vendors and Packaged Software products. This information is used to determine the finalists who will receive the Request for Proposal.

I. IPT Name:		
II. Deliverable Name: Packaged Software Request for Information		Date Completed:
III. Contact Information		
	Name	Channel Unit
IPT Sponsor		
Channel Task Manager		
CIO Task Manager		
Contractor Task Manager		
IV. Task Order Number:		



**Department of Education
Student Financial Assistance**

DATE

Mr./Ms.
Company
Address
City
State, Zip

Dear XXXX,

COMPANY NAME has established a project team to evaluate *FUNCTIONAL AREA* software packages to replace their current applications. In this effort, *COMPANY NAME* will be working closely with *CONSULTING COMPANY* to determine the best solution. Your firm has been identified as a possible provider of such a solution.

Contained within this document you will find background information related to *COMPANY NAME*, as well as some evaluation questions. The responses to the initial high level questions will determine which vendors will be selected as finalists and who will participate in a more detailed evaluation. Your response is requested by *DUE DATE*. All responses will then be evaluated against *COMPANY NAME*'s high level evaluation criteria. A decision as to which vendors will be further considered will be made by *DATE*. At that time all vendors will be notified in writing as to their status.

If you have any questions, do not hesitate to contact *COMMUNICATION LIAISON* at (555) 555-1212.

Very truly yours,

COMPANY NAME Software Selection Team



I. INTRODUCTION

All material and information provided by *COMPANY NAME* shall be regarded as confidential information. Likewise, all materials contained within your response will be treated confidentially. This information will, however, be made available to all project team members to assist in the evaluation process.

Software Selection Project Approach and Status

This RFI represents one of several steps taken to provide *COMPANY NAME* with a software solution able to meet its business requirements and long-term objectives. In the first phase of the project, the software marketplace was screened. The result was a list of vendor candidates which met *COMPANY NAME*'s core requirements.

In this phase of the project, the software selection scope has been narrowed to focus on the U.S. implementation.

The next few weeks will be used to further analyze these alternatives. Responses to the RFI will provide the project with more detailed information to help further differentiate the vendor solutions. In addition to highlighting the best alternative for *COMPANY NAME*, this evaluation will increase *COMPANY NAME*'s confidence in, and understanding of, the product which will be implemented and the effort required to perform the implementation.

Software Selection Schedule

In order to control the software selection process and allow equal opportunity for each candidate, the following guidelines must be followed without exception.

Your response must be received by *COMPANY NAME* on or before *DATE*. Please submit the response to:

COMMUNICATION LIAISON

COMPANY NAME

Address 1

Address 2

City, State Zip Code



II. COMPANY NAME OVERVIEW

[This section should discuss the background of the company. Some topics that should be covered are the following:

Headquarters, other locations

Revenue

Number of employees

Market/Industry information

Organization Structure

Annual Report might be included in appendix]



III. PROJECT OVERVIEW

[This section should discuss the objectives of the software selection project. Some topics that should be covered are the following:

- Scope of project
- History of problems of sponsoring organization faces
- Description of current applications
- Target applications and technical platform
- Other initiatives related to selection currently in process
- Other relevant or unique information
- Project organization chart]



APPENDIX (EVALUATION QUESTIONS)

Insert high level screening criteria. The following is an incomplete example of typical questions asked at this stage.

General Information

How many people does your company employ?

What was the revenue of your company for the last five years?

What product lines does your company support?

What modules are supported by your product? Please include the most recent version number.

What industries does your product support?

How many organizations do you serve in the INDUSTRY NAME industry? Please list.

Does your product support the following multinational processing?

- Multi-currency
- VAT/GST processing
- Multi-language screens and documentation

What foreign languages does your product support?

What countries are your products installed in?

Functionality

Does your product currently support budgeting?

Does your product currently support consolidations?

Does your product currently support allocations?

Technical

What hardware platforms does your product line currently support?

What additional hardware platforms are planned to be supported? Please provide approximate availability.

What relational databases are currently supported?



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What additional relational databases are planned to be supported? Please provide approximate availability.

Is a client/server architecture supported by your product line? Please explain briefly.

What client operating environment is supported? (i.e. Windows/DOS, Presentation Manager, MOTIF, etc.)

What development tools are used by your product?

What reporting tools are integrated with your product?